

The Ton

Private Family Office Gathering
Thursday, 11th May 2023, Yacht Club de Monaco, Monaco



Debrecks



MONTFORT



FORTUS
INVESTMENT
MANAGEMENT



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Integrity. Trust. Connection. The Ton.

Dragonfly

Asset Management

*Humans have long been fascinated with Dragonflies.
Their ability to seek out pure water.
Their awe-inspiring flight and speed.
Their ability to adapt to change with indescribable ease.*

Digital assets have shown remarkable performance in recent years, displaying compelling attributes that make them an essential investment option:



- **Rapid growth** – Digital assets have experienced exponential growth with the Total Crypto Market rising by 384% in the last 3 years despite the 15-month bear market.
- **High liquidity** - The digital asset market offers high liquidity and 24/7 trading with the Top 50 Crypto exceeding \$1B market cap.
- **Diversification** - Digital assets provide a unique diversification opportunity within an investment portfolio. They are increasingly seen as an uncorrelated safe haven alternative to traditional asset classes.
- **Technological innovation** - Digital assets are at the forefront of technological advances, revolutionising every industry from consumer goods to logistics and finance, positioning them for continued exponential growth.
- **Potential for high returns** – While the sector is inherently volatile, identifying winners has been extraordinarily profitable. For example, Ethereum has returned 12x in 3 years, eclipsing the overall market performance.
- **Imminent Regulation** – Regulation will enable institutions to inject fresh capital, with ARK estimating a corresponding increase in the value of the sector from \$1T to \$25T by 2030.

The Dragonfly Digital Assets Edge

Combining in-depth fundamental analysis, rigorous risk control, and a focus on highly liquid large cap crypto assets with sustainable competitive advantages, Dragonfly offers a fresh perspective in the ever-evolving digital asset space.

- **Experienced Team** - With decades of proven, award-winning expertise in managing over \$2 billion in assets, we bring a wealth of experience to the table.
- **Tech-native** - Possessing a comprehensive understanding of digital asset technologies and the factors driving their value.
- **Actively Managed** - A long-term investment strategy centered on capital appreciation and consistently delivering market outperformance (alpha).
- **Unique Strategy** - An institutional-quality investment approach within a novel sector, providing exceptional capital growth and yield opportunities.
- **Robust Infrastructure** - Collaborating with top-tier partners, who have proven operational and regulatory oversight excellence.

64 Knightsbridge | London SW1X 7JF
Pouneh Bligaard | Pouneh@DragonflyDigitalAssets.Fund

Dragonfly
Asset Management



CONNECTING DYNAMIC ENTREPRENEURS WITH EXPERIENCED INVESTORS

Private investment roadshows and bespoke events in Europe, Africa (Mauritius), Asia and Australia.

Relationships with more than 800 families

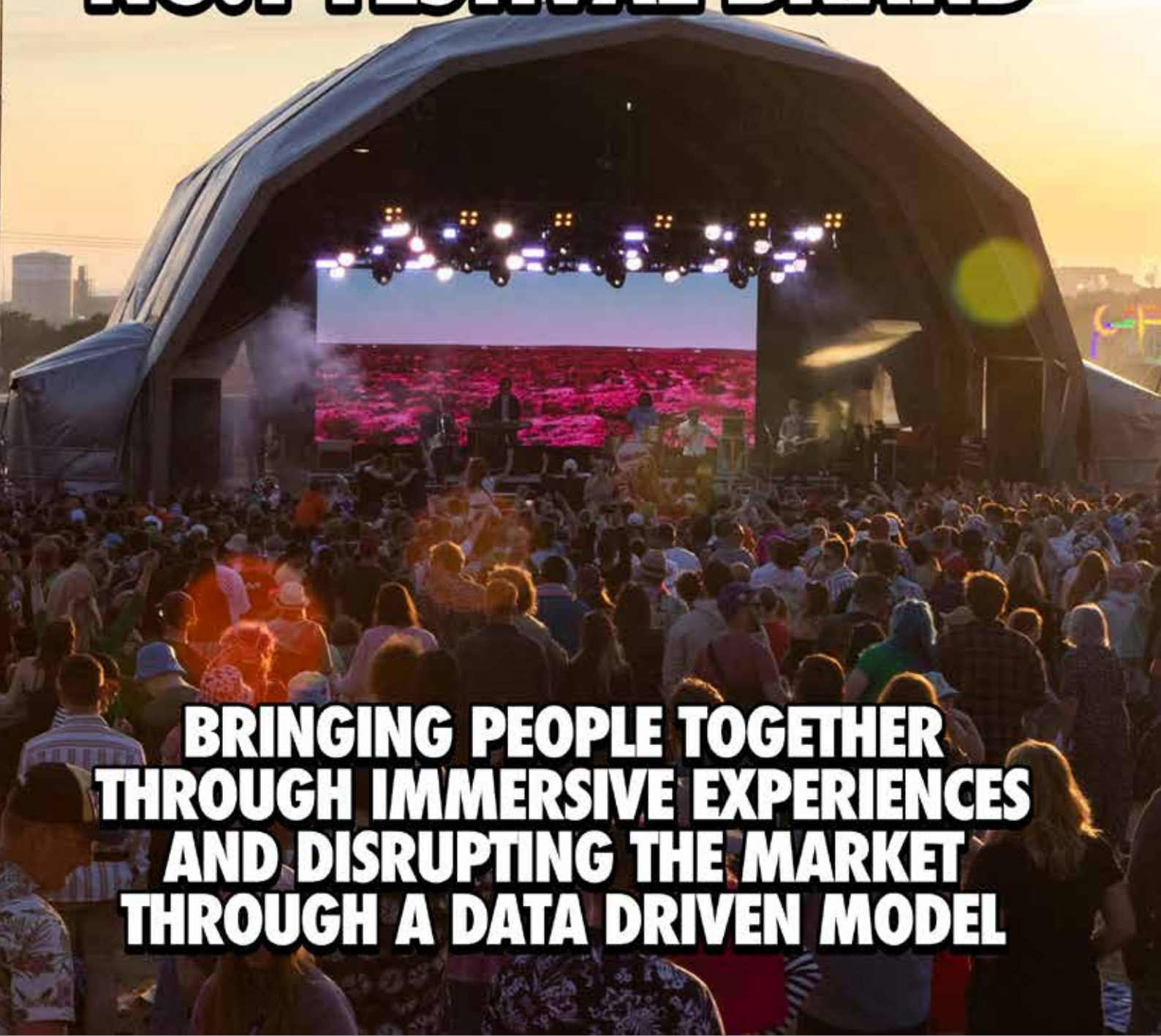
Raised in excess of US\$ 4 billion for a wide variety of investment strategies and companies

Debrecks brings most interesting investment ideas to a broad range of private investors and family offices

- Seig has over 25 years of experience with Family Offices in the UK, starting with Cazenove & Co., where for 12 years he looked after Family Office funds and companies, and built relationships with over 500 families.
- In 2000, Seig founded Debrecks Marketing through the Family Office network in Europe, the Middle East, the Far East, and Australia.
- DeBrecks offers an introductory service either one-to-one, or a full marketing campaign in the UK and Europe.
- Debrecks has raised in excess of US\$4 billion for various investment strategies, including ABL, European long/short, MENA long/short, Africa funds, global macro, long only boutiques, Multi-managers (UK), Fund of Funds, Green Funds, and Private Equity.
- In 2004, Seig founded a service to visit and meet with the family offices of Australia and the Super Funds (Pension Funds). In excess of 20 managers representing different strategies have visited and raised money.
- In 2005, Seig also founded the European Family Office Investment Forum. He launched the first Leadership Summit and Investment Summit in London and continues to run these events with Incisive Media. The events have become increasingly successful in terms of numbers (over 300 families attend each event), and in terms of raising money for different ideas and funds through presentations to the Family Office audience.
- In 2011, Seig was appointed Chairman of FMG Eurasia, which specialises in frontier funds, Iraq, MENA, Russia, China, India, and Africa. As Chairman, Seig facilitates distribution in Europe for FMG



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**BRINGING PEOPLE TOGETHER
THROUGH IMMERSIVE EXPERIENCES
AND DISRUPTING THE MARKET
THROUGH A DATA DRIVEN MODEL**

BARONSCOURT ESTATE

DISTILLERY COMPANY LIMITED



- A remarkable management team has been assembled to deliver a commercial-scale distillery and branded Irish Whiskey business.
- Irish Whiskey is booming and is expected once again to double in volume and value by 2030; demand continues to exceed supply.
- The setting is outstanding, the project team exceptional and the commercial team highly experienced and successful.
- This is a rare opportunity to participate in the establishment of a world-class facility in a wonderful location to serve a lucrative industry.
- Exit opportunities are anticipated, but investors are not expected to wish to divest.



www.baronscourtwhiskey.com

Contact:

darthur@baronscourtwhiskey.com | jhamilton@baronscourtwhiskey.com

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CECIL WRIGHT

MONTFORT

A photograph of two hikers standing on a snow-covered mountain peak. They are silhouetted against a bright, hazy sky. The background shows a vast range of mountains stretching into the distance under a clear blue sky. The foreground is a textured, snow-covered ridge.

Montfort is an award-winning reputation management consultancy, delivering data-driven strategic advice to the world's leading companies, individuals and organisations.

We develop communications and digital strategies that help our clients engage effectively with their stakeholders, manage their corporate reputation and enhance long-term business performance.

Email Sally Todd
todd@montfort.london

Visit
montfort.london

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Agenda

Welcome | Seig de Vater, The Ton

Keynote | Pragnell | Charlie Pragnell, CEO | Rare Diamond Acquisition

Charlie Pragnell graduated in economics and politics and began his training in the United States studying gemmology and jewellery design at the Gemological Institute of America, based in Carlsbad, California. Charlie then worked in New York's renowned diamond district, before completing an apprenticeship with one of the world's most prominent antique and period jewellery dealers. Charlie's continued passion for the jewellery trade brought him back to England where he worked in London's West End before joining the family business in January 2005. Charlie has been the firm's managing director since 2010.

Presentation One | Dragonfly Asset Management

Pouneh Bligaard, CEO | The Rise of the New Internet: The Enormous Potential of Crypto

Pouneh Bligaard is the CEO of Dragonfly Asset Management, a Crypto Assets research company that applies traditional investment methods to Crypto. An Iranian-born mother of three, Pouneh is a veteran of the fund management industry. She has worked at leading financial organisations such as MUFG and HSBC, and is a hugely successful equity fund manager, having managed a range of equity funds totaling £2bn and winning multiple awards for her flagship fund's consistent performance. Her 25+ years of investment experience have been directly transferable to the Crypto Assets space. She has invested successfully by focusing on projects with the strongest and most sustainable business models.

Presentation Two | Wealtheon Asset Management

John-Patrick Broekhuijsen, Managing Director

John-Patrick Broekhuijsen is a seasoned asset manager and former banker, active in the financial business for more than 30 years. After he set-up and managed two branches for the Dutch-Belgian private bank Van Lanschot Bankiers in Belgium between 1995 and 2008, he moved to Geneva, Switzerland where he became subsequently member of the management team at BNP Paribas Wealth Management and Bank Sarasin. In 2014 he was asked by Peter and Victor Zwart (founders and sole shareholders at Wealtheon) to join the Wealtheon Group. John-Patrick is member of the Management and Investment Committee at the Wealtheon Group and Managing Director of the Swiss office. He acts as a trusted advisor for several, internationally based UHNWI families, some of them already for the second & third generation.

Victor Zwart, Founder & CEO

Victor founded Wealtheon Asset Management in Geneva in 2005. The company expanded into Belgium and The Netherlands in 2008 and in 2020, acquired Torrebos, an independent investment advisor in Belgium. Today the Wealtheon Group is offering Growth, Value and High Conviction strategies to over 400 (U)HNWI families. Victor started his finance career in New York in 1996, and later moved to Eindhoven, Amsterdam and Geneva. Victor co-founded the Wealtheon foundation, a charity that supports small and midsize charities who aim to improve the lives of children and young adults. Victor is a WWF ambassador and committee member of HRW Belgium.

Presentation Three | Life Science People Limited

David Spencer-Percival CEO, founded two global recruitment companies scaling them from start up to more than £100+ million turnover, both being sold to Private Equity companies for £50m and £60m respectively. He is one of the world's leading recruitment entrepreneurs having been listed in The Sunday Times Fast Track 7 times. He was won both Entrepreneur of the Year and Growing Business of the Year at The National Business Awards and was been awarded The Queens Award for Enterprise by Her Majesty Queen Elizabeth II

Presentation Four | Montfort Communication

Sally Todd, Senior Consultant | Managing reputations in the digital age

Sally has 25 years' experience as a strategic communications professional focused on the global asset management sector. She has wide-ranging experience in advisory roles, having held senior management positions at PR firms Penrose Financial and MHP, and has worked with publicly listed companies and start-ups, supporting international businesses across integrated communications, capital raising, strategy and marketing. Previously, Sally worked within the Strategy Group at Moore Capital Management. She was a director at Northhill Capital (now B-Flexion) an investor in specialist asset management firms, then global head of communications at Janus Henderson Investors. Sally holds an MA (Hons), French & German and an MSc, Science & Technology Studies from Edinburgh University.

Presentation Five | Fortus (Bioenergy) Investment Management

Alastair MacLeod, Principal Partner

Alastair MacLeod (MRICS) is a qualified Chartered Surveyor and Investment Banker. He worked in the UK with Cluttons managing large Institutionally owned property portfolios. He moved to banking in 1987 and has been involved in finance for over 35 years working for Nomura, Barings Securities and latterly Goldman Sachs. Since 2013 he has been working as a financial consultant in private equity and project financing, working on several projects in the real estate and renewable energy sector. He is based in the UK.

Nicholas Tanner, Princiial Partner

Nicholas Tanner was born and raised in Tokyo Japan and attended Sheffield University in UK with a BA in Business and Japanese. He worked initially in UK and Japan with Cazenove & Co, a leading UK stockbroker, where he was a partner. He has also worked as a hedge fund manager at a boutique Asian investment house and has helped to build Asian investment banking operations at KBC in London. Since 2012 he has been based in Singapore where he has established his own equity advisory business. He is also actively involved in private equity and fund-raising activities.

Presentation Six | Baronscourt Whiskey Distillery Company Limited | Lord James Hamilton, David Arthur

Lord Hamilton manages the many and varied interests of the Abercorn Estates Partnership and identified the opportunity to add distilling to the 400-year old estate's varied business interests; David is a long-standing and passionate advocate of Irish Whiskey, who has put together a very experienced team to deliver a state-of-the-art, commercial-scale distillery. With their colleague, Peter Darbyshire, a multiple liquor industry MD and global brand builder, they are establishing an Irish Whiskey business that will be built on deep experience and knowledge of all aspects of the value chain.

Presentation Seven | Escape Records

Adam Gore, Founder

Adam has been working in the industry part time during his studies and full time since graduating from Cardiff University. With 15 years' experience and knowledge of the UK events market, he began his first business operating small events within the nightclub circuit with a very modest turnover. Before utilising that experience and contact base to launch Escape Records to its current position of circa 8 million pound annual revenue, his key strengths outside of entrepreneurial spirit is creativity and ability to disrupt the market of the major players in the music industry with relatively limited budgets and resource. Adam's focus post raise is to utilise tech strategy and app creation to further optimise a position of strength in the UK and build fast growth and shareholder value.

Simon Delve, Executive Chairman, Escape Records

Simon is an entrepreneur with a background in sales, marketing, customer service / retention & operations with over 20 years' experience in the corporate world mostly operating in the automotive industry. He joined Land Rover at the tender age of 16 as an apprentice technician to then becoming a fully qualified Land Rover technician spending over 18.5 years with Land Rover. Simon then went on to lead very successful businesses including Toyota and Lexus where again he implemented a culture and foundation to build the business up to deliver successful results. Simon's key objectives since joining Escape Records in 2021 has been to help build a successful team, create a solid foundation that is sustainable to withstand the rapid growth of the company whilst implementing systems and process to allow the business to deliver on its current and future objectives.

Thank you and Closing Address | *Seig de Vater, Founder, The Ton*

Speakers

	<p>Family-owned and run jeweller George Pragnell prides itself in a carefully selected world-class offering in Stratford-upon-Avon and at the 'by appointment' showroom in Berkeley Square, London. The company specialises in handcrafted British jewellery, Swiss watches, and antique and period jewellery. The family is focused on the acquisition of the finest rare gemstones.</p>
	<p>Dragonfly Asset Management is a Crypto Assets research company that applies traditional investment methods to Crypto. They offer the Dragonfly Digital Assets Fund to professional investors, providing diversified liquid exposure to the leading Crypto Assets while maintaining a rigorous risk control framework. The fund uses top-tier partners, who have demonstrated operational and regulatory oversight excellence. What sets Dragonfly's investment team apart is their unique multi-disciplinary expertise and years of working together. The team combines years of long-term asset management experience - gained over many growth sectors and cycles - together with talented members who are Crypto tech-natives.</p>
	<p>Wealtheon is a family-owned, independent asset manager with roots going back over 50 years. Wealtheon is a knowledge-driven company with a history of co-investing alongside clients to achieve attractive risk adjusted returns over the long-term. They invest mainly in publicly listed, liquid companies and conduct a combination of top-down and bottom-up approaches. As an experienced and professional partner, they work very closely with their clients' families and advisors to ensure expectations are met to the highest quality. Wealtheon have offices in Belgium, The Netherlands and Switzerland.</p>
	<p>Life Science People is a UK-based recruitment agency specialising in the life sciences sector. They provide bespoke recruitment solutions for companies looking to hire talented professionals in areas such as research, development, clinical trials, and regulatory affairs. The company recruits permanent and contract positions in the Life Sciences sector across UK /EU and the US within:</p> <p>Clinical / Digital Health / Health Tech Commercial / Medical Devices Pharma and Biotech</p> <p>We have opened offices in London and Los Angeles and have scaled to just under 100 people with plans to grow to 500 people in 5 years with further offices planned in UK (Oxford and Cambridge), Europe (Switzerland and Germany) and a further US expansion (New York, Boston and Miami)</p>
<p>MONTFORT</p>	<p>Montfort is an award-winning reputation management consultancy, delivering data-driven strategic advice to the world's leading companies, individuals and organisations. We develop communications and digital strategies that help our clients engage effectively with their stakeholders, manage their corporate reputation and enhance long-term business performance.</p>
	<p>The proposal is to set up an offshore open-ended fund to address the huge opportunity available in developing and managing Waste to Energy projects in the UK. The fund will invest in these projects, and they can be replicated anywhere in the world outside the US, subject to suitable local conditions. The UK power and waste markets are ripe for exploitation, as the combination of years of under-investment, lack of long-term planning and introduction of zero emissions targets, combined with the war in Ukraine have created a perfect storm resulting in the sky-high price of energy in Europe and in the UK. The returns are significant.</p>



The Baronscourt Estate Distillery Company: an experienced, successful management team, applying a proven strategy to build an enterprise of commercial scale at low risk, in a lucrative, rapidly expanding industry that's short of supply. Set in a very special location with all the attributes needed to create and sustain a strong, international, branded Irish Whiskey business, the Distillery project is currently going through the planning process. The strong ESG credentials include an achievable ambition to be carbon negative, stimulating the region's economy and building on the estate's history of admirable corporate governance. Short term revenue opportunities have been identified and exit opportunities will arise, but investors are expected to want to stay with the project for the long-term. The initial lease is for 125 years. www.baronscourtwhiskey.com



Escape Records is a company that has been built through collaboration and acquisition, with founders and leaders who have collectively over 50 years' experience within events and business they have built a proven business model that has created a strong foothold in the heart of Wales music and events scene. Having delivered what is now Wales largest music festival that is also complimented by a selection of festivals along the M4 corridor, and further supported by the delivery of over 500 club and shows per year Escape Records are undoubtedly the leading events company in Wales. With what the experienced team have already successfully delivered, Escape Records plan to cement Wales first Tier 1 camping festival, branch out to Europe, be the 1st choice Media outlet in Wales and build a technology platform that will further engage & monetise their community through 2023 and onwards.



Bainbridge Partners is a leading boutique investment firm based in London, specializing in providing tailored financial solutions to high-net-worth individuals and institutional clients. Founded in 2003, the firm has built a reputation for its bespoke wealth management services and expertise in the areas of Alternative Investments and Risk Mitigation Strategies. Bainbridge Partners has a team of seasoned investment professionals with decades of experience in the financial industry, who work closely with clients to understand their unique investment objectives and risk profiles. With a focus on delivering uncorrelated, liquid, high risk-adjusted returns through active management and a disciplined approach to investment selection, Bainbridge Partners has established itself as a trusted partner to its clients, helping them achieve their financial objectives.



The Château de Meursault is located in the prestigious Meursault appellation, a global reference for great white wines. The 65 hectares of vineyards spread over a hundred plots give rise to five Grands Crus, eighteen Premiers Crus, and a dozen village or regional appellation wines such as Aloxe-Corton, Beaune, Volnay, and Pommard. These names are all evocative of the great terroirs of Burgundy. The magnificent Cistercian-style cellars, dug from the 12th to the 19th century, extend over 3500m² under the castle and its outbuildings. Up to 800 barrels rest in the large cellar, offering a unique spectacle in Burgundy.



Life Science People



David Spencer-Percival
FOUNDER & CEO

David Spencer-Percival CEO, founded two global recruitment companies scaling them from start up to more than £100+ million turnover, both being sold to Private Equity companies for £50m and £60m respectively. He is one of the world's leading recruitment entrepreneurs having been listed in The Sunday Times Fast Track 7 times. He was won both Entrepreneur of the Year and Growing Business of the Year at The National Business Awards and was been awarded The Queens Award for Enterprise by Her Majesty Queen Elizabeth II

Life Science People is a new recruitment/staffing business applying expertise for the following areas



Pharma/Biotech



Medical Devices



Health Tech & AI



Service Companies

Year 1 - 2021 (audited) revenue was £6.6m with £3.2m in net fee income

Year 2 - 2022 (audited) revenue was £16.8m (155% growth) with £7.2m net fee income (125% growth)

Year 3 - 2023 (budget) revenue is £27m (61% growth) with £10.6m in net fee income (47% growth)

Year 4 - 2024 (plan) revenue is £41m (52% growth) with £15.3m in net fee income (44% growth)

Year 5 - 2025 (plan) revenue is £58.7m (43% growth) with £21m in net fee income (37% growth)

Our Offer:

£250k-£1m investment in the form of interest paying Loan Notes (10% annually paid monthly) for 3-5 years converting to equity at current valuation (£10m) on the sale (75%+) of the business.

Contact us:

hello@lifesciencepeople.co.uk

+442038544800



Your value, our experience,
for common growth

YOU'RE IN GOOD HANDS HERE - AS A FAMILY-OWNED BUSINESS AND ACTIVE IN THE FINANCIAL SECTOR, WE ASSIST THOSE WHO WISH TO INVEST, TO MAKE AN INFORMED DECISION BETWEEN GROWTH AND VALUE INVESTING, ALLOWING THEM TO REALIZE THEIR FINANCIAL OBJECTIVES.

TALK TO US

With more than two generations of experience in asset management, we dispose of a lot of knowledge to advise you. Whether it's for your family office, active estate planning or inheritance, we would love to hear about your situation!

ASSET MANAGEMENT
Wealtheon

www.wealtheon.ch / info@wealtheon.ch / +41 (0)22 320 4740

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Fortus Investment Management

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The two principal partners are;



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FORTUS
INVESTMENT
MANAGEMENT



CHÂTEAU DE MEURSAULT

Mille ans d'histoire...

Vineyard conducted in organic farming
Famous place for wine tourism

5 Grands Crus – 18 Premiers Crus



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The Ton | Private Family Office Event | Thursday, 11th May 2023, Yacht Club de Monaco, Monaco



for more information please contact
Seig de Vater seig@theton.co.uk | Marguerite Weber marguerite@theton.co.uk